Production Manager

Product User Manual

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Table of Contents

Introduction..... 3
Production Tasks..... 5
Default Schedule..... 6
Production Staff..... 8
Production Cost Type..... 8
Note Type 8
Book Production..... 9
    Production Deadlines..... 9
    Production Roles..... 9
    Print Runs..... 10
    Costs..... 11
    Reviewers/Referees..... 12
    Notes..... 12
Production Scheduling..... 13
Production Class..... 15
View All..... 15

Introduction

Production Manager provides a space for you to manage your production schedules, breaking them down into stages and tasks that can then be attributed to specific members of your team. This part of the system is manipulated by two different types of users:

- The person responsible for assigning roles to the relevant people throughout your organisation.

- Those who will be completing those tasks throughout the production process and updating the system accordingly.

Production Manager is entirely flexible; the functionality is determined by you, based on the items within the schedules that you create. The configuration of the system is established by you to meet the requirements and work flows of your business. Adjustments can be made throughout the production schedule and notes can be added to inform future print runs. This will allow you to improve on your production processes in the future. You can also establish a sophisticated level of permissions in order to ensure accuracy throughout your system.

There are mandatory fields within the system, which enable you to get the best use and functionality from the system. All mandatory fields are marked with a red *. Throughout the following manual, we will discuss the elements within the system out of the order that they appear in the main menu. This will allow us to demonstrate the most logical way of manipulating the data within the system.

Glossary of sections within Title Manager:

Book Production:
Where all of the titles currently in their pre and production stages are listed. Clicking on a particular title name will take you to a set of tabs of information relevant to creating a schedule. We will take the tabs in turn a bit later, as much of the information that appears in them is populated from different areas of **Production Manager**.

Production Scheduling:
At a glance information, essentially the production schedule with its various elements laid out on a grid. This allows you to quickly spot check the items within your schedules. All of your titles appear in this screen, displayed in order of publication date.

Introduction

Production Staff:
Where you will add the usernames for all of the people who are involved in the production schedules.

Production Tasks:
Where you establish all of the different elements of your production schedule. The following are a few general task type examples that you will be familiar with:

1) Copy In
2) Layout done
3) First Proof Corrections
4) Second Proofs Corrected
5) Shipping
6) Publication

Default Schedule:
Where you will pull in the **Production Tasks** to organise them within a schedule template. These templates are based on the processes of publishing a range of products (eg. Paperbacks, Posters, Hardbacks, Ebooks, etc) and are made up of a set of standard tasks determined by you. Without these schedules established on the system, you won't be able to access the titles within **Book Production**.

Production Cost Types:
Where you create a set of 'cost type' labels in order to allocate them subsequently within the **Costs** tab in **Book Production**. These types of costs will allow you to see and then analyse the total costs involved in the production of one of your books.

Note Types:
Where you create note types that can then be categorised throughout the production schedule. If you want to establish editorial note types specifically for the editorial department, for instance, you can do that here.

As mentioned earlier, we will walk you through the system by taking each item within the **Title Manager** in its most logical position.

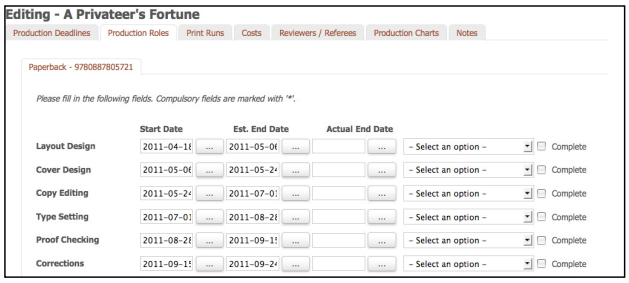
Production Tasks

The first step is to establish all of the tasks that make up your schedules. These items will then appear in a drop-down menu in **Default Schedule** (see pages 6 and 7), enabling you to assign them to individual staff members.

Click on **Create New** and you will be taken to a screen with the following fields:

- * **Label**: Name your task, eg. *Layout Text*

- **Checkbox Label**: This field allows you to add checkboxes beside each task as they appear in the first two tabs of **Book Production** (see page 9). You can create the label '*complete*', as demonstrated below. When members of your team finish their tasks, they can then tick the '*complete*' box.



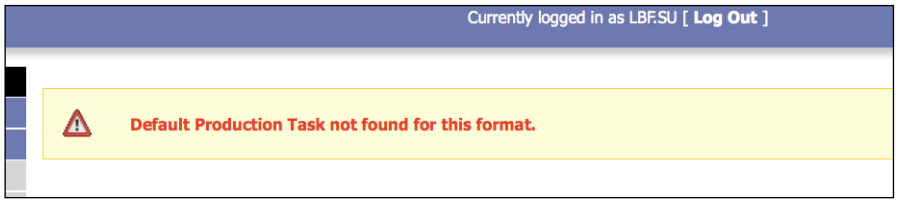
- **Colour**: Set a colour to represent the tasks on the **Production Scheduling** grid (see page 13). To do so, click on the small box and adjust the colour by dragging the cursor up and down. Click **OK** when you are finished.

Click on **Create** when you are finished.

Repeat the above instructions for all other tasks. There is no limit to the number of tasks you can create. To remove tasks from the system, go into the main **Production Tasks** screen. Click on the box beside the relevant label and then on **Remove Selected.**

Default Schedule

Before you can start working on schedules for individual books, you must first establish your **default schedules**. Best practise is to first create a schedule called '*Default*' that will automatically be applied to all of your titles until you create format-specific schedules. If you do not do this and you haven't created a format-specific schedule, then you will get the following error message when trying to access a title through the **Book Production** screen (see pages 9-12 for more information**).**



In the main, creating your default schedules is a one-off task and does not take long.

Click on **Create New** and you will be taken to a screen with the following fields:

- * **Form**: Choose a format from the list of options in the drop-down menu. This menu is automatically populated with all of the possible publishing formats. If you are creating your general *Default* schedule, then leave this item at *Default*.

- **Deadlines – Type & Duration**: A deadline is a task that occurs prior to a title entering the actual production schedule. For instance, you cannot begin the schedule until the manuscript is received from the author. A deadline is not related to a specific individual and is potentially a milestone. A milestone is an item that cannot overlap with another element within the schedule. Cover design and layout can be done simultaneously, however typesetting cannot be completed before the copy-editing stage. In this case, typesetting would be a milestone. A deadline may also have a duration of 0.

  - Choose a **task** from the drop-down menu (see page 5 for information about creating tasks to populate this list).

  - Establish the **duration** of the deadline by typing in a numerical value; label the period either by '*day*' or '*week*'. If the item is a **milestone**, tick this box. Bear in mind that you must set at least 1 deadline in your schedule, otherwise you will get an error message (see image above) when accessing the title in **Book Production**.

  To add another **Deadline**, click on '*Add another task*' and repeat the above instructions.

Default Schedule

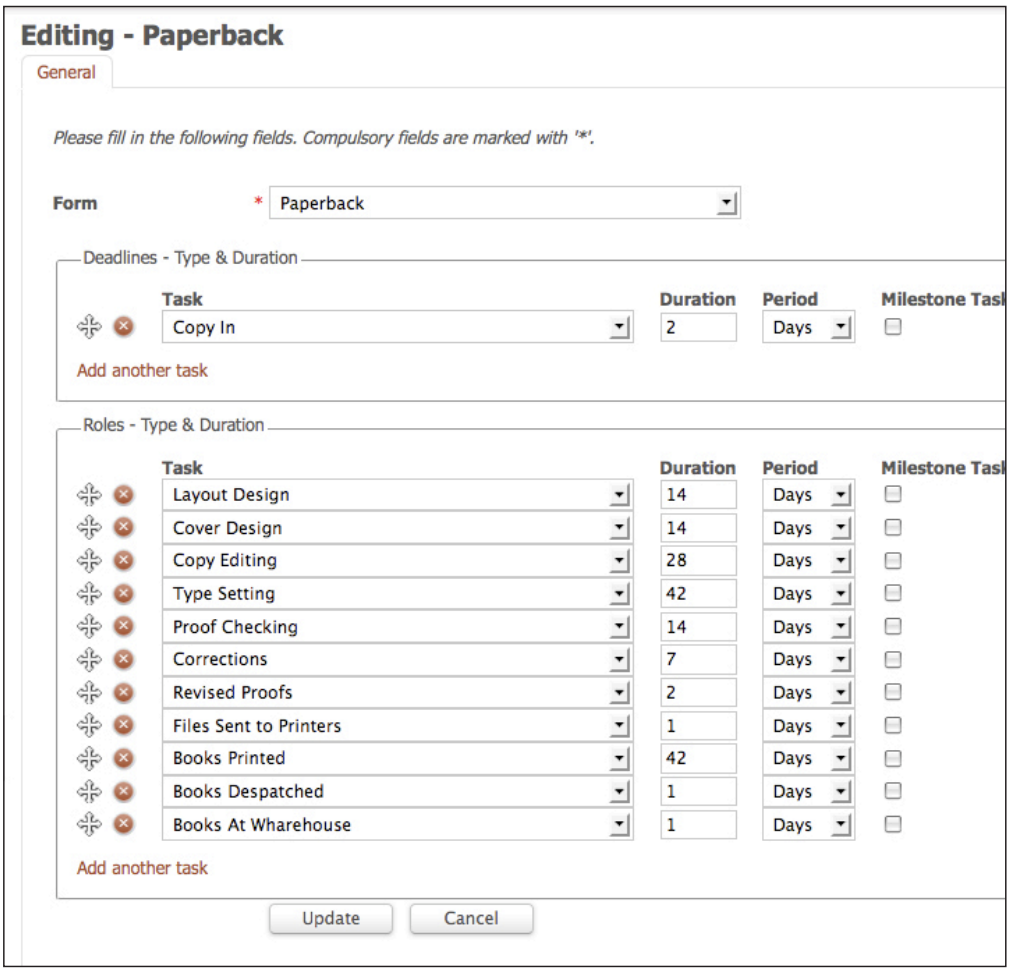
- **Roles – Type & Duration**: A role is a task that is needed to create the title and move it from concept into publication. These tasks are specific to individuals. As a result, **Roles** will have fixed resources scheduled against them, whilst **Deadlines** will not. It will be typical to have more **Roles** in your schedule than **Deadlines**.

  - Choose a **task** from the drop-down menu (see page 5 for information about creating tasks to populate this list).

  - Establish the **duration** of the deadline by typing in a numerical value; label the period either by '*day*' or '*week*'. If the item is a **milestone**, tick this box.

  To add another **Role**, click on '*Add another task*' and repeat the above instructions.

The **deadlines** and **roles** that make up your schedule will look like a variation of the following:



Production Staff

You will want to assign your production tasks to individual members of your team. To add staff names to the system, click on **Create New** and fill in the following fields:

- Type in the * **email** address. Note that the system will do a reverse look up; if the email address is already on the system, then the rest of the data will automatically populate.

- If the email has not already been added, then add the following items accordingly: **Short / Nick Name, First Name, * Last Name, Phone, Mobile / Cell** and **Fax**.

- * **Colour**: Choose a colour to represent each member of staff on the **Production Scheduling** grid (see page 5 for more information).

- Click **Create** when you are finished.

To remove a name from the system, click on the box beside the name within the main **Production Staff** page and then on '*Remove selected*'.

Production Cost Type

Production Manager also allows you to keep track of the costs involved in producing a particular title. In order to keep these records, you will need to first establish the **Production Cost Type** labels.

- Click on **Create New**.

- Type in the name of your **Cost Type** in the empty field displayed, eg. *Illustrations, Copy editing, Repro House, etc.* (These cost types are designed to work with your work flow, which is why there aren't standard types to choose from in a drop-down menu. You determine the types based on your company's processes and needs.)

- Click **Create** when you are finished.

To remove a cost type label from the system, click on the box beside the name within the main **Production Cost Type** page and then on '*Remove selected*'.

Note Types

To create a **Note Type**, which allows you to classify your notes, click on **Create New** and then type in the name of the * **Note Type**. Click **Create** when you are finished. This item, and any others, will then appear subsequently in **Production Scheduling** in a drop down menu (see page 14).

Book Production

Now that you have created your range of tasks, established your default schedules and added your staff to the system, it is time to use all of these items to create the schedules for specific titles. You will do this through a set of tabs within **Book Production**. The tabs are as follows:

Production Deadlines

- All of the deadlines created in **Production Tasks** (see page 5) will appear in this tab.
- Give your first deadline a date using the provided calendar. The system will then ask if you want to update the proceeding fields with default duration dates as established in **Production Tasks** (see page 5). Click '**OK**'. You can go back into these dates and change them manually if necessary. If you would rather not have them automatically populated, click **Cancel** and then add your dates to each task through the calendars.
- **Announcement Date, Publication Date, Expected Ship Date** and **On Sale Date** will be populated automatically from the info in **Title Manager** (see Title Manager manual). If you amend or delete the dates here, the info will simultaneously change in **Title Manager**.
- Click **Update** when you are finished and you will be taken to the next tab:

Production Roles

- All of the tasks established in **Default Schedule** (see page 7) will appear in this tab.
- Add the first **Start Date** through the provided calendar. The **Est. End Date** will automatically update with the information established in **Production Tasks** (see page 5). Click **OK** to update the proceeding fields with the default duration dates. You can go back and change these dates manually if necessary. If you would rather not have them populated, click **Cancel** and then add your dates to each task through the calendars.
- Allocate each task to specific colleagues by choosing names from the drop-down menus.
- **Actual End Date**: When you complete a task, the actual end date will automatically be populated in this field. You can then take this information into account when establishing the dates for future production schedules.
- Add **Comments** in the field provided in case information must be considered in the future.
- Click **Update** when you are finished and you will be taken to the next tab:

Book Production

Print Runs

This tab provides fields for keeping records of particular print runs, and includes a calculator for establishing the estimated cost of printing your books. The fields are as follows:

- **Page Height** and **Page Width,** metrical or imperial depending on your configuration.
- **Class**: Choose the relevant item from the drop down menu. See page 15 for more info.
- * **Printer**: Choose the relevant printer from this drop-down menu.
- **Order Number**: This can be an internal number or a supplier number.
- **Ordered?**: Tick this box if the order has been sent to the printer.
- **Sent/ Expected/ Received**: Choose the dates from the calendars provided.
- **Quantity Ordered**: A numerical value for the print run.
- **Delivered**: Numerical value for the actual number of copies delivered.
- **Publicity Covers**: Numerical value for a set of extra jackets printed for publicity.
- **Adv. Copies to Publ.**: Numerical value for a set of advance copies for publicity.
- **Reprint**: Tick this item if this is not the first print run.
- **Unit Cost**: Choose from the drop-down menu to establish the currency, then put in the numerical value per copy.
- **Estimated Cost**: The system will automatically calculate the estimated cost based on the *Quantity Ordered* and the *Unit Cost*.
- **New Cover**: Tick this item if you are reprinting a title with a new cover.
- **Paper**: Add in any relevant information regarding the paper weight, etc.
- **Spine**: Add in any relevant information regarding the spine, such as the width.

Book Production

- **Distribution Comments**: If one of your distributors has requirements about pallet size, for instance, that info would go here.

- To add another print run, click on '*Add another print run'* and fill in the fields as above.

- Click **Update** when you are finished and you will be taken to the next tab:

Costs

- **Cost Type**: This drop-down menu is populated by the information added in the **Production Cost Type** screen (see page 8). Choose the relevant item.

- **Unit Cost**: Numerical value for the rate.

- **Units**: Numerical value for the number of total units, eg. hours, days, number of pages, quantity of illustrations, etc.

- **Estimated Amount**: Is automatically populated when the two fields above are added.

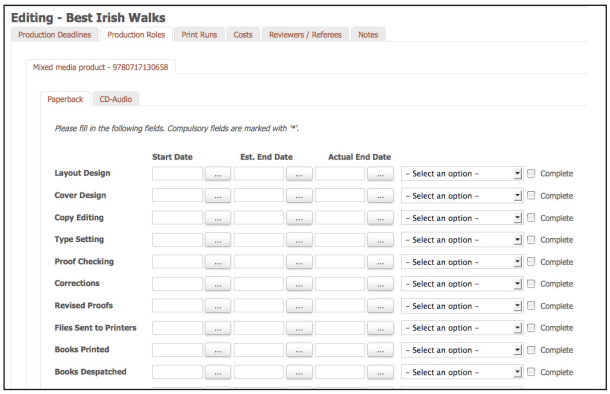
- **Actual Amount**: Once the job is complete, go back and fill in the actual costs. This will allow you to subsequently establish budgetary variances and a comparative analysis.

To add more costs, click on '*Add another production cost*'.

- **Total Estimated Cost**: Is automatically populated from the **Estimated Amounts**.

- **Total Actual Cost**: Is automatically populated based on the **Actual Amounts**.

NB: Contained items (within mixed media formats) will each have their own tab embedded within the following **Book Production** tabs: **Production Deadlines, Production Roles** and **Costs**. A book and a CD, for instance, sold together in the same product, each have their own tab in the image to the right.



Click **Update** when you are finished and you will be taken to the following tab:

Reviewers/Referees

If you have external contacts that will need to review your titles, then you can add their names into this screen. If you are publishing a technical manual, for instance, you will need to verify certain parts of the text in order to establish accuracy.

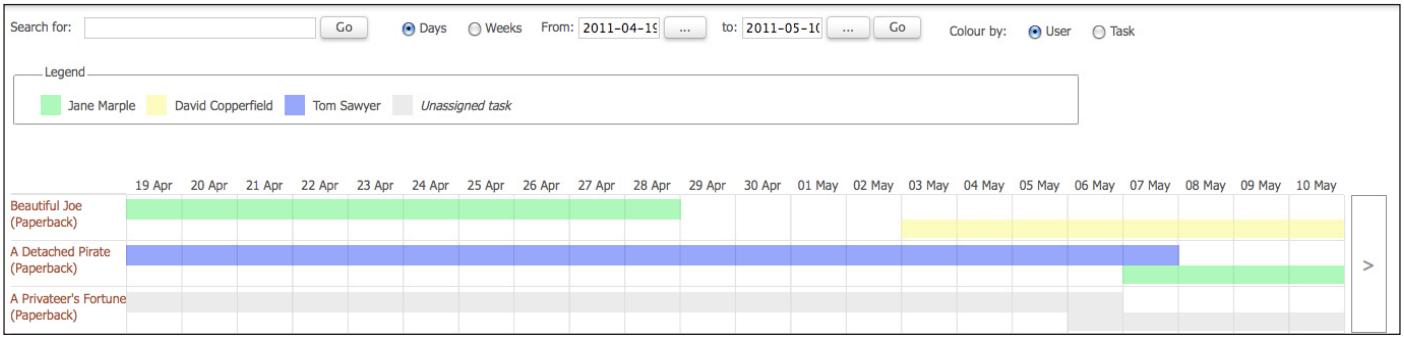
Click **Update** when you are finished and you will be taken to the following tab:

Notes

If there have been any notes added within **Production Scheduling** (see page 14), then they will appear in this screen in list form. This ensures that you will still be able to access the relevant notes even after a title has published and is no longer displayed in **Production Scheduling**.

Production Scheduling

Now that you have created your tasks, established where these tasks fit within a range of default schedules, and filled in the appropriate details for each title on your production list, you can now have a look at the schedule for any particular book.



What you are looking at:

- The system is set up to automatically show you three week's worth of production details for all of your unpublished titles. To adjust the dates, click on the **From** and **To** fields on the top of the screen and adjust accordingly.

- If you want to look at the production schedule for a single book, rather than your complete list of titles, then type in the title name in the search box at the top of the screen and the information will be displayed for you.

- You can view the information displayed either by **User** or by **Task**, noticing that the grid is characterised by coloured bars. These colours were established by you previously (see pages 5 and 8). The legend at the top of the screen provides details about the colours and which tasks or users they correspond with for quick reference.

- To toggle the view between **Days** or **Weeks**, select the relevant item at the top of the page.

- To move the view of your grid on by three weeks, click on the arrow at the far right of the screen.

- Clicking on a title name within the list on this screen takes you to the tabs within **Book Production**. You can make amendments if necessary.

Production Scheduling

You can make changes and updates to the schedule through Production Scheduling:

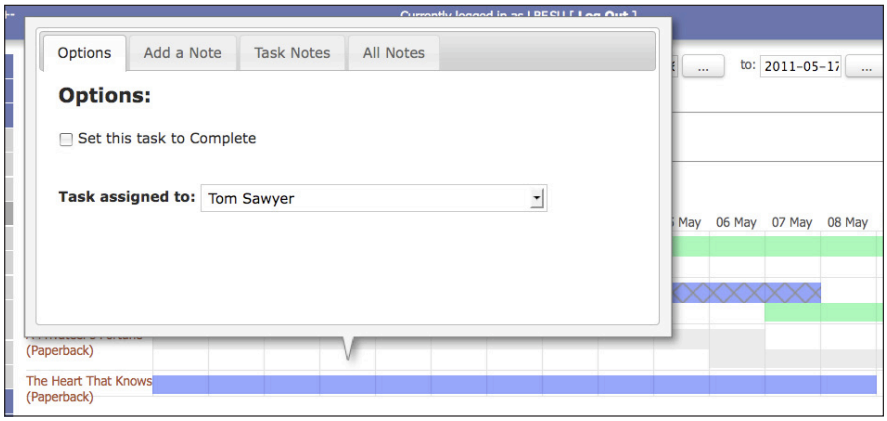
Rather than going back into the parts of the system to change the data as established early on, you can manipulate the information from the **Production Scheduling** screen.

1) You can adjust the duration of the items within the schedule by clicking on either end of the relevant bar and dragging it back and forth.

2) You can also move an item in full by clicking on the bar and dragging it across.

NB: These adjustments will impact the rest of your schedule; keep an eye on where your tasks are moved to in the event that they conflict with milestone tasks. These adjustments also change the end date as it appears on the **Book Production - Production Roles** tab (see page 9).

3) You can update the status of a task by clicking on the relevant bar. A pop up will appear on the screen with the following tabs:



a) **Options**: If the item is finished, tick '*Set this task to complete*'. An 'X' will be added across the bar to mark it as finished in the grid. You can also change who the task is assigned to in this tab.

b) **Add a Note**: Choose the relevant **Note Type** from the drop down menu (see page 8 for more information). Type in the note in the box provided and then click **Add**.

c) **Task Notes**: The notes added in the previous tab will appear in a list here and are specific to a particular task and a title.

d) **All Notes**: Filters by the user; all of the items in this tab will relate to a specific staff member and all of the books he/she is currently working on.

Production Class

The **Production Class** area of the system allows you to further classify the status of your print run. For instance, a book being published for the first time in paperback could have the production classification of: *HB into PB*. If you are reprinting a title with a new cover and a new ISBN, then you could classify it as a Relaunch. As with the rest of Production Manager, this part is entirely flexible. How you use **Production Class**, what sorts of classifications you choose to create, is up to you and your company's needs.

To create a new **Production Class l**abel, click on **Create New** and then type in the name of the * **Production Class**. Click **Create** when you are finished. This item, and any others, will then appear subsequently in **Book Production - Print Runs** in a drop down menu (see page 10).

View All

COMING SOON